



Borel Private Bank & Trust Company®

A Division of Boston Private Bank & Trust Company

Business Area: Deposit Management & Treasury

Functional Title: Banking Office Manager – Burlingame & Palo Alto

Job Summary:

Position is responsible for managing a banking office and overseeing banking office staff. Primarily responsible for the development and building of strong new client relationships with the goal of increasing deposits and identifying cross sell opportunities. Implement strategies to build strong business partnerships within the company to facilitate growth across multiple lines of business. Direct the general operation of the banking office to ensure delivery of service excellence and operational efficiency.

Roles and Responsibilities:

Sales and Service

- Establish marketing and sales plans as well as team goals and objectives
- Consistently meet/exceed sales and referral goals by conducting client sales interviews, cross-selling and up-selling products and services.
- Build internal and external relationships, provide outstanding ownership and follow-through
- Respond to difficult or complex product and service inquiries from clients, team and business partners
- Model exemplary client service behaviors

Internal Operations:

- Ensure compliance with Federal, state and local laws and regulations as well as relevant bank policies and procedures
- Oversee income and expense management
- Recommend new hires, salary increases, promotions, employee disciplinary actions and terminations
- Facilitate and monitor employee training

Qualifications:

- 7-10 years of experience
- Demonstrated managerial and supervisory experience
- Outstanding organization and leadership ability
- Strong sales skills

All Boston Private Bank & Trust Company employees are expected to adhere to the following competencies:

Core Competencies:

- **Client Focus**-Dedicated to meeting the needs of internal and external clients; listens effectively and establishes and maintains relationships and gains client's trust and respect.
- **Ethics, Integrity and Trust** - Considers ethical issues before decisions are made and seeks to achieve results that are in the best interest of the Bank.
- **Ownership, Accountability, Responsibility and Compliance** - Takes ownership of tasks, projects, and relationships and follows through on obligations and promises.
- **Self Development and Learning** - Personally committed to learning and actively works to continuously develop professionally.
- **Teamwork and Collaboration** -Works collaboratively; finds common ground and solves problems for the good of all and can represent his/her own interests and yet be fair to the team.

Supervisor Competencies:

- **Caring about Direct Reports, Fairness, and Listening** – Treats direct reports equitably; acts fairly; practices attentive and active listening and ensures that staff has the information, tools, and support to successfully complete job requirements.
- **Decision Making and Problem Solving** – Makes decisions in a timely manner, sometimes with incomplete information and under tight deadlines and pressure. Uses a mixture of analysis, wisdom, experience and judgment to solve difficult problems with effective solutions.
- **Delegating, Directing and Motivating Others** – Establishes clear directions; sets stretching objectives, empowers others and creates a climate in which people want to do their best, contribute and succeed.
- **Developing Direct Reports and Others** – Provides challenging and stretching tasks and assignments; holds frequent development discussions; coaches direct reports and others; is aware of each person's career goals.
- **Informing and Communicating** – Provides the information people need to know to do their jobs and to feel good about being a member of the team, business area, and/or the Bank. Provides information on a timely basis and is a clear communicator.
- **Planning & Organizing** - Accurately scopes out length and difficulty of tasks and projects for self and team; breaks down work into process steps; develops schedules and task/people assignments; sets objectives and goals; measures performance against goals and evaluates results.